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CENTRAL WATERFRONT PLAN

MONITORING REPORT 2006-2010

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PLANNING DEPARTMENT**

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CENTRAL WATERFRONT PLAN MONITORING REPORT 2006-2010

San Francisco Planning Department
February 2012



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1. INTRODUCTION

The Eastern Neighborhoods community planning process was launched in 2001 to determine how much of San Francisco's remaining industrial lands to preserve and how much could be transitioned to other uses, especially residential. In 2008, four new area plans for the Mission, East SoMa, Showplace Square/Potrero Hill, and Central Waterfront neighborhoods were adopted.

These resulting Area Plans contained holistic visions for affordable housing, transportation, parks and open space, urban design, and community facilities. Specifically, the Central Waterfront Plan calls for the following: a) maintaining Central Waterfront's established character as mixed use, working neighborhood with strong ties to the city's industrial economy; b) strategically increasing housing in the Central Waterfront; c) establishing a land use pattern that supports and encourages transit use, walking, and biking; and d) connecting the neighborhood with its neighbors and the water's edge, and improving the public realm so that it better supports new development and the residential and working population of the neighborhood.

Map 1 shows the Central Waterfront Plan area as generally bounded by Mariposa Street on the north, San Francisco Bay on the east, Islais Creek on the south, and Highway I-280 on the west.

A five-year time series Eastern Neighborhoods Monitoring Program was also mandated to report on key indicators affecting the implementation of each area plan. This Central Waterfront Five-Year Monitoring Report, the first since the Plan's adoption, covers office and retail development and employment trends; housing production and conversion trends; affordable housing; and project entitlement requirements and fees. In addition, this report also describes existing and planned infrastructure and other public benefit improvements. The complete text of monitoring requirements can be found in Appendix A.

The Planning Department is issuing this first Central Waterfront Five-Year Monitoring Report in 2011, covering the period from January 1, 2006 through December 31, 2010. In effect, this Monitoring Report includes development activities in the years immediately preceding and following the adoption of the Central Waterfront Plan in 2008. Because of these relatively recent actions, this first

five-year time series monitoring report can only present limited information. This first report will best serve as a benchmark for subsequent reports as it will provide information on existing conditions at the time the Central Waterfront Plan was adopted. Subsequent time series monitoring reports for the Central Waterfront Plan area will be released in years ending in 1 and 6.

The time series report relies primarily on the Housing Inventory, the Commerce and Industry Inventory, and the Pipeline Quarterly Report, all of which are published by the Planning Department. Additional data sources include: the California Employment and Development Department (EDD), the San Francisco Municipal Transportation Agency (SFMTA), Co-Star Realty information, Dun and Bradstreet business data, CBRE and NAI-BT Commercial real estate reports, and information gathered from the Department of Building Inspection, the offices of the Treasurer and Tax Collector, the Controller, and the Assessor-Recorder.

Map 1
Central Waterfront Plan Boundaries



2. COMMERCIAL SPACE AND EMPLOYMENT

While the area is itself diverse, Central Waterfront has traditionally been characterized by industrial uses with residential enclaves interspersed between Mariposa and 23rd Street or what is roughly known as the Dogpatch neighborhood. Less than 6% of the land area is currently classified as having residential uses, including about 3% housing mixed with commercial uses, typically on the ground floor. Commercial land uses take up almost two thirds of the land area, with light industrial or production, distribution and repair (PDR) uses being the largest single category. Schools and cultural destinations comprise a marginal portion of the land use, as does retail and entertainment. (See Appendix B, Table BT-1 for land use distribution tables for Central Waterfront and San Francisco).

The Central Waterfront Plan supports small and moderate size retail establishments in neighborhood commercial areas, while allowing larger retail in the new Urban Mixed Use districts only when part of a mixed-use development. The Plan also encourages life science development in the vicinity of Mission Bay and, in the core PDR area generally south of 23rd Street, contains controls that protect PDR businesses by prohibiting new residential development and limiting new office and retail.

2.1 Commercial Space Inventory

Table 2.1.1 below is an inventory of non-residential space in Central Waterfront as of 2010. Fully 70% of commercial land use in the Central Waterfront is PDR and only 12% office. Approximately 15% is a mix of uses where no use predominates. The remainder is retail (12%) and CIE (1%). A comparison of Citywide shares is also provided.

Table 2.1.2 shows commercial and other non-residential development activity in the Central Waterfront Plan area between 2006 and 2010 while Table 2.1.3 shows corresponding figures for San Francisco. Non-residential development in the Central Waterfront made up less than 1% of citywide total commercial projects completed in the last five years.

Commercial projects recently completed in the Central Waterfront are part of mixed-use developments. These projects include 15,000 retail square feet in the former Esprit building at 900 Minnesota, and 8,000 retail square feet at 680 Illinois. Map 2 shows the location of recently completed commercial developments in the Central Waterfront.

Table 2.1.1
Commercial and Other Non-Residential Building Space, Central Waterfront and San Francisco, 2010

Non-Residential Land Use	Central Waterfront		San Francisco		Central Waterfront as % of San Francisco
	Area (Sq Ft)	% Distribution	Area (Sq Ft)	% Distribution	
Cultural, Institution, Educational	36,337	1%	50,746,480	20%	0%
Medical	4,014	0%	4,088,100	2%	0%
Office	692,901	12%	73,448,880	29%	1%
PDR / Light Industrial	3,946,040	70%	33,862,200	14%	12%
Retail	121,996	2%	19,734,160	8%	1%
Visitor / Lodging	2,840	0%	21,267,690	9%	0%
Mixed Uses	832,607	15%	46,528,800	19%	2%
Total	5,636,735	100%	249,676,310	100%	2%

Table 2.1.2 Commercial and Other Non-Residential Development Trends, Central Waterfront, 2006-2010

Year Completed	Cultural, Institutional, Educational	Medical	Office	PDR / Light Industrial	Retail	Visitor / Lodging	Total Commercial Sq Ft	Total Commercial Sq Ft
2006								-
2007								75,380
2008								15,232
2009	-	-	-	-	15,000	-	15,000	16,120
2010	-	-	-	-	7,926	-	7,926	108,000
Grand Total	-	-	-	-	22,926	-	22,926	214,732

Table 2.1.3 Commercial and Other Non-Residential Development Trends, San Francisco 2005-2010

Year Completed	Cultural, Institutional, Educational	Medical	Office	PDR / Light Industrial	Retail	Visitor / Lodging	Total Commercial Sq Ft	Total Commercial Sq Ft
2006	74,558	-	328,477	-	469,576	25,447	898,058	1,830,597
2007	18,432	17,438	771,227	8,837	132,673	49,258	997,865	924,058
2008	160,549	-	1,283,774	1,350	192,430	433,000	2,075,103	1,005,787
2009	167,607	4,120	1,155,580	128,450	478,528	-	1,934,286	2,071,103
2010	60,752	16,196	30,000	70,000	194,989	-	371,937	1,919,586
Grand Total	481,898	37,754	3,569,058	208,637	1,468,196	507,705	6,277,249	7,751,131

Map 2
Commercial Development Trends,
Central Waterfront Plan Area, 2006-2010



No new commercial development

2.2 Commercial Development Pipeline

At the end of the fourth quarter in 2010, commercial development pipeline in the Central Waterfront came to a net total of about 2,870 square feet (Table 2.2.1). While there are project proposals that would be creating new commercial space (about 26,000 square feet), these are offset by the conversion of industrial production, distribution and repair (PDR) space from commercial to residential use.

About 23,300 square feet of retail space have received entitlement and/or have building permits issued. However, an almost equal amount of light industrial PDR square feet

will be converted to housing. There will also be a small increase of 2,800 square feet of office space if proposed projects in the pipeline are completed.

Table 2.2.2 shows the commercial development pipeline for San Francisco for comparison. The development pipeline in the Central Waterfront represents less than 1% of the citywide pipeline while the loss of PDR space in the Central Waterfront represents almost 5% of the loss citywide. Map 3 shows the locations of the proposed commercial developments in the plan area.

Table 2.2.1 Commercial and Other Non-Residential Development Pipeline, Central Waterfront Q4 2010

Development Status	Total Commercial Sq Ft	Retail	Cultural, Educational, Institutional	Office	Medical Office	PDR/Light Industrial	Visitor/Lodging
PLANNING ENTITLED	(4,461)	10,339	-	-	-	(14,800)	-
UNDER CONSTRUCTION	(4,461)	10,339	-	-	-	(14,800)	-
Planning Approved	-	-	-	-	-	-	-
Building Permit Filed	-	-	-	-	-	-	-
Building Permit Approved/ Issued/ Reinstated	-	-	-	-	-	-	-
UNDER REVIEW	7,335	13,000	-	-2,835	-	(8,500)	-
Planning Filed	(5,665)	-	-	2,835	-	(8,500)	-
Building Permit Filed	13,000	13,000	-	-	-	-	-
GRAND TOTAL	2,874	23,339	-	2,835	-	(23,300)	-

Table 2.2.2 Commercial and Other Non-Residential Development Pipeline, San Francisco Q4 2009

Development Status	Total Commercial Sq Ft	Retail	Cultural, Educational, Institutional	Office	Medical Office	PDR/Light Industrial	Visitor/Lodging
Planning Entitled							
CONSTRUCTION	479,670	8,423	437,559	58,918	-	(25,230)	-
Building Permit Approved/ Issued/ Reinstated	794,235	50,972	(22,095)	826,123	-	(85,371)	24,606
Planning Approved	6,854,572	1,324,246	175,980	5,167,450	(33,117)	(88,557)	308,570
Building Permit Filed	801,540	87,080	19,180	916,830	-	(221,550)	-
Under Review							
Building Permit Filed	602,228	18,082	25,553	564,742	-	(6,149)	-
Planning Filed	5,910,545	1,640,697	1,001,797	3,238,464	-	(67,760)	97,347
Grand Total	15,442,790	3,129,500	1,637,974	10,772,527	(33,117)	(494,617)	430,523

Map 3

Commercial and Other Non-Residential Development Pipeline, Central Waterfront, Q4 2010



Numbers indicate net gross square feet

- Under Review
- Entitled
- Under Construction

2.3 Employment

2.3.1 Office Jobs

San Francisco is a regional employment hub, with the largest concentration of office jobs in the Bay Area including financial, legal, and other specialized business services. According to the state Employment Development Department (EDD), there were about 225,900 office jobs in San Francisco at the end of September 2010 (Q3). Of these jobs, less than 800 (or less than 1% of the citywide total) were in the Central Waterfront Plan area; there were just over 220 establishments (less than 1% of San Francisco establishments) with office employment (see Table 2.3.1.)

2.3.2 Retail Jobs

San Francisco is also a regional shopping destination and 20% of all city jobs are in retail/entertainment (see Table 2.3.1). There were about 1,000 retail jobs in the Central Waterfront Plan area, about 24% of total jobs in the area; this also represented less than 1% of all citywide retail jobs.

Table 2.3.1
Employment, Central Waterfront and San Francisco, Q2 2010

Land Use	Central Waterfront				San Francisco			
	Establishments		Jobs		Establishments		Jobs	
	No.	% of Total	No.	% of Total	No of Establishments	% of Total	No	% of Total
Cultural, Institution, Educational	10	3%	70	2%	1,659	3%	67,735	12%
Medical	3	1%	41	1%	858	2%	34,449	6%
Office	106	30%	772	18%	13,480	25%	225,853	41%
PDR / Light Industrial	138	39%	2,350	55%	5,231	10%	76,821	14%
Retail	68	19%	1,046	24%	7,466	14%	107,422	20%
Visitor / Lodging	-	0%	-	0%	299	1%	17,751	3%
Other	25	7%	28	1%	24,317	46%	19,825	4%
TOTALS	350	100%	4,307	100%	53,310	100%	549,856	100%

2.3.3 PDR/Light Industrial Jobs

Although no longer a center for industry, 14% of San Francisco jobs are in production, distribution, or repair (PDR) related businesses. These light industrial businesses contribute to the city's economy by providing stable and relatively well-paying jobs for the many San Franciscans without a four-year college degree and by supporting various sectors of the City's economy. There were about 2,350 PDR jobs in the Central Waterfront, about 55% of total jobs in the area; this also represented 3% of all citywide PDR jobs.

2.3.4 Estimated New Jobs in Retail and Office Pipeline

As discussed in the previous section, approximately 26,000 square feet of retail and office space are in the commercial development pipeline. Assuming an average employee density of 350 square feet, these new commercial spaces can accommodate around 70 jobs when completed. This does not account for potential job losses however, associated with the conversion and demolition of PDR space.

2.3.5 Job Loss

New projects in the development pipeline will convert or demolish 23,300 square feet of PDR space. Assuming an average employee density of 550 square feet, this space could accommodate about 40 PDR jobs.

3 HOUSING

Housing and the provision of adequate shelter, especially for those with low to moderate incomes, continue to be chronic issues in San Francisco. The Central Waterfront Plan calls for housing affordable to a wide range of incomes that enhance the mixed-use character of designated areas. The Plan also encourages housing compatible with the historic Dogpatch area, especially in scales and densities that reflect the area's fine-grained fabric. The Plan envisioned that as many as 2,000 additional housing units can be accommodated within the plan boundaries. Mindful of the area's industrial character, new housing will be permitted only in the Urban Mixed Use district, generally north of 23rd Street.

The Central Waterfront Plan also recognizes the value of sound, existing housing stock and call for its preservation. Dwelling unit mergers are strongly discouraged and housing demolitions are allowed only on condition of adequate unit replacement.

3.1 Housing Inventory and New Housing Production

According to the 2010 Census, there were almost 1,000 units in the Central Waterfront Plan boundaries in April of 2010; this represents less than 1% of the Citywide total. Table 3.1.1 shows that approximately 200 new units were built in the past five years in the Central Waterfront. Of these, 114 units resulted from conversions of commercial uses. Table 3.1.2 shows the Citywide figures for comparison. Less than 2% of the net increase in the City's housing stock in the last five years was in the Central Waterfront area. Map 4 shows the location of recent housing construction. Additional details about these new development projects can be found in Appendix B, List BL-3.

Map 4
New Housing Production.
Central Waterfront, 2006-2010



Numbers indicate net new residential units

Table 3.1.1
New Housing Production, Central Waterfront, 2006-2010

Year	Units Completed from New Construction	Units Demolished	Net Units Gained or Lost from Alterations	Net Change in Number of Units
2006	0	0	0	0
2007	0	0	0	0
2008	0	0	0	0
2009	65	0	47	112
2010	21	0	67	88
5-Year Totals	86	0	114	200

Table 3.1.2
New Housing Production, San Francisco, 2005-2009

Year	Units Completed from New Construction	Units Demolished	Net Units Gained or Lost from Alterations	Net Change in Number of Units
2006	1,675	41	280	1,914
2007	2,197	41	451	2,567
2008	3,019	29	273	3,263
2009	3,366	29	117	3,454
2010	1,082	170	318	1,230
5-Year Totals	11,339	350	1,439	12,428

3.2 Housing Development Pipeline

As of December 2010, there were 406 units in nine projects in the housing development pipeline for Central Waterfront (Table 3.2.1). Map 5 shows the location of these proposed housing projects by development status. List BL-4 in Appendix B provides a detailed list of these housing pipeline projects.

Table 3.2.1 shows that about 270 units – or 66% – are under construction and will likely be completed within the next two years. Approximately 280 units have received Planning Department entitlements and could see completion within the next two to seven years.

About 31% of the units in the residential development pipeline are in the early stages of the process and are expected to be completed in the next five to ten years. In comparison, 48% of proposed units Citywide – nearly 21,100 units – are under review and have yet to receive entitlements. About 40% of the units in the housing pipeline citywide are under construction while the remainder have been entitled and have filed for or have received building permits.

If completed in the next 10 years, the current residential pipeline within the Central Waterfront would mean an increase of almost 57% in the area's housing stock. Successful accommodation of this growth, as envisioned in the Plan, would require infrastructure improvements that encourage transit use and enhance urban amenities in the neighborhood.



Numbers indicate net new residential units

- Under Review
- Entitled by Planning Department
- Permitted by Department of Building Inspection
- Under Construction

Map 5
Housing Development Pipeline by Development Status, Central Waterfront, Q4 2010

Table 3.2
Housing Development Pipeline, Central Waterfront and San Francisco, Q4 2010

Development Status	Central Waterfront		San Francisco	
	No. of Projects	No. of Units	No. of Projects	No. of Units
Planning Entitled	279	-	23,027	451
Construction	269	-	1,728	117
Planning Approved	-	-	16,903	91
Building Permit Filed	-	-	1,916	69
Building Permit Approved/ Issued/ Reinstated	10	2	2,480	174
Under Review	127	4	21,023	276
Planning Filed	71	2	19,532	84
Building Permit Filed	56	2	1,487	190
Grand Total	406	9	44,050	727

3.3 Affordable Housing in Central Waterfront

At the time of the Central Waterfront Plan adoption and approval, there were two single-room occupancy residential hotels (SROs) in the Central Waterfront, providing a total of 45 units. SROs typically provide housing affordable to lower income, single-person households. These SROs units made up less than 1% of the citywide total of SROs.

The Central Waterfront Plan recognizes that housing affordability, together with a mix of housing types, fosters a diverse and vibrant community. The Plan relies on three mechanisms to provide affordable housing in the plan area:

- a) Providing a high percentage of affordable units, above and beyond the City's Inclusionary Program, in new mixed income projects;
- b) Allowing developers of market-rate housing to dedicate land for the development of 100 percent affordable housing available to very low and low-income households;
- c) Encouraging the provision of moderate affordable units on-site, as housing available to middle income households (those making below 150 percent of the median income).

3.4 New Affordable Housing Production, 2006-2010

Affordable housing was a high community priority during the Eastern Neighborhood planning process. The Eastern Neighborhood Plans aim to provide new housing to meet the needs of low, moderate and middle income households. Higher percentages of affordable inclusionary units are required of market-rate developments larger than five units.

Because virtually all housing projects in the Central Waterfront chose to pay affordable housing in-lieu fees or the provision of off-site affordable units, only two inclusionary affordable units were built in Central Waterfront between 2006 and 2010. This represents only 1% of all housing produced in the area (Table 3.4.1). By comparison, the citywide share of new affordable housing construction was 27%, or over 3,300 units (Table 3.4.2 Affordable Housing Production, San Francisco, 2006-2010). Additional details about these affordable housing projects can be found in Appendix B, List BL-5.

Table 3.4.1
Affordable Housing Production, Central Waterfront, 2009-2010

Year	Public Subsidy	Inclusionary	Total
2006	-	-	2
2007	-	-	-
2008	-	-	-
2009	-	-	-
2010	-	-	-
Totals	-	2	2

Table 3.4.2
Affordable Housing Production, San Francisco, 2006-2010

Year	Public Subsidy	Inclusionary	Total
2006	265	189	454
2007	517	167	684
2008	385	379	764
2009	832	44	876
2010	508	40	548
Totals	2,507	819	3,326

Map 6
New Affordable Housing, Central Waterfront, 2009-2010



3.5 Housing Stock Preservation

The Central Waterfront Plan supports the preservation of the area's existing housing stock and prohibits the residential demolition unless these would result in sufficient replacement of housing units. Demolitions are also restricted to ensure the preservation of affordable housing and historic resources.

In the reporting period, only one unit in the Central Waterfront Plan area was demolished (Table 3.5.1). Citywide, the number of units lost through demolition totaled 572. Table 3.5.2 shows citywide figures for comparison. Illegal units removed also result in loss of housing; corrections to official records, on the other hand, are adjustments to the housing count.

Table 3.4.1
Units Lost, Central Waterfront, 2006-2010

Year	Units Lost Through Alterations by Type of Loss					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
2006	-	-	-	-	-	-	-
2007	-	-	-	-	-	-	1
2008	-	-	-	-	-	-	-
2009	-	-	-	-	-	-	-
2010	-	-	-	-	-	-	-
TOTALS	-	-	-	-	-	-	1

Table 3.4.2
Units Lost, San Francisco, 2006-2010

Year	Units Lost Through Alterations by Type of Loss					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
2006	12	21	0	7	40	41	81
2007	10	16	4	5	35	81	116
2008	19	28	0	1	48	29	77
2009	2	42	5	12	61	29	90
2010	5	22	1	10	38	170	208
TOTALS	48	129	10	35	222	350	572

3.6 Other Changes in the Housing Stock – Condo Conversions and Evictions

The type of housing opportunities determines the type of people who live in the neighborhood. For example, single-family homes tend to support families and/or larger households, and are typically homeowners, while flats or apartments tend to be occupied by a single-person or smaller households, which are largely renters. Group housing and assisted living quarter are housing types available for the elderly and people who have disabilities.

Condo conversions increase San Francisco's homeownership rate – estimated to be at about 38% in 2009, up from 35% in 2000. However, condo conversions also mean a reduction in the City's rental stock. In 2009, an estimated 48% of households in the Central Waterfront were renters. Less than 1% of San Francisco's rental units are in the Mission.

Table 3.6.1 shows that in the last five years, eight units in four buildings in the Central Waterfront were converted to condominiums. This represents less than 1% of all condo conversions citywide.

Another indicator of change in the existing housing stock, are owner move-in and Ellis Act evictions. These evictions effectively remove units from the rental housing stock and are, in most cases, precursors to condo conversions.

Table 3.6.2 shows that in the last five years, there were no owner move-in evictions or Ellis Act evictions in the Central Waterfront. Other types of evictions, also included in Table 3.6.2, include evictions due to breach of rental contracts or non-payment of rent; this could also include evictions to perform capital improvements or substantial rehabilitation.

Table 3.6.1
Condo Conversion, Central Waterfront, 2006-2010

Year	Central Waterfront		Mission as % of Citywide Total	
	No. of Bldgs	No. of Units	No. of Bldgs	No. of Units
2006	-	-	0.0%	0.0%
2007	-	-	0.0%	0.0%
2008	-	6	1.0%	1.0%
2009	-	2	0.0%	0.0%
2010	-	-	0.0%	0.0%
Totals	4	8	0.0%	0.0%

Table 3.6.2
Evictions by Type, Condo Conversion, Central Waterfront, 2006-2010

Year	Central Waterfront		
	Owner Move-In	Ellis Act Withdrawal	Other Eviction
2006	-	-	2
2007	-	-	2
2008	-	-	3
2009	-	-	4
2010	-	-	1
Totals	-	-	12

Year	Central Waterfront as % of Citywide Totals		
	Owner Move-In	Ellis Act Withdrawal	Other Eviction
2006	0.0%	0.0%	0.0%
2007	0.0%	0.0%	0.0%
2008	0.0%	0.0%	0.0%
2009	0.0%	0.0%	0.0%
2010	0.0%	0.0%	0.0%
Totals	0.0%	0.0%	0.0%

4 PUBLIC BENEFITS

The Eastern Neighborhoods Plans call for up to 10,000 units of transit-oriented housing (market-rate and affordable) and 13,000 new jobs over 20 years. To support the growing population in these areas, the Area Plans also call for needed public amenities including parks, community facilities, and transportation.

The Eastern Neighborhoods Area Plans identify at a high level the types of infrastructure improvements necessary to enhance livability, enable development intensity, and serve these changing neighborhoods. Specifically, the Central Waterfront Plan seeks to strengthen the area's accessibility and improve public transit while supporting the circulation needs of PDR businesses. The Plan also calls for the provision of new open space and the creation of "Green Connector" streets, with wider sidewalks and improved landscaping.

4.1 Transportation Improvements – EN Trips

The Eastern Neighborhoods Transportation Implementation Planning Study (EN TRIPS) is the transportation implementation plan for all four Plan Areas of the Eastern Neighborhoods. EN TRIPS has completed its existing and future conditions technical analyses to understand current transportation opportunities and constraints. Findings and identified strategies were presented at a community meeting held in February 2011. These strategies include: Smart Parking Management, Congestion Pricing, Transportation Demand Management, and expanded efforts at shuttle coordination. Each of these strategies is already under study, implementation or development, but potential exists to expand their application.

In addition to these policy strategies, other investments identified could include:

- Transit Priority Street treatments – including 3rd street, 4th street, Division, and 16th Street.
- New bicycle facilities – including the prioritization of certain bicycle lanes, or the creation of dedicated rights-of-way.

- Further developing comfortable pedestrian spaces to facilitate walking - including wider sidewalks, curb bulb outs, medians, and additional landscaping.

In the Central Waterfront, the City has already invested heavily in the T-Third Street light rail service. Expected growth in travel demand however, may result in substantially increased travel volumes on Third Street, possibly generating major delays at the intersection of Third Street and 16th Street. At this time, the City has not identified ways to increase capacity through this travel corridor.

Despite this recent investment in transit infrastructure, car use remains the predominant mode of travel to work for employed residents of Central Waterfront (Table 4.1.1). The 2005-2009 American Community Survey estimated that 52% of Central Waterfront residents commuted by car, while 25% used transit. Only 2% walked to work and none reported biking. The number of people working from home however was estimated at 18%.

Compared to the City as a whole, Central Waterfront commuters travelled by car more and less by other modes. Citywide, 47% of commuters travel by car and 32% by transit; 10% walked to work, 3% biked, and 2% commuted by other means; only 7% however worked from home.

4.2 Streetscape Improvements

The Central Waterfront Plan calls for the creation of a network of "Green Connector" streets with wider sidewalks and landscaping improvements that connects open spaces and improves area walkability. Specifically, the Plan proposes to create a greenway along 24th Street that will connect Warm Water Cove to the rest of the neighborhood. Additional greenways are proposed along Minnesota Street to connect Esprit Park to Muni Park and passing the proposed IM Scott school site park. These and other specific streetscape improvements remain under study as of the writing of this report.

Moreover, in December 2010, the City adopted the Better Streets Plan that contains design guidelines for pedestrian

Table 4.1.1
Commute Mode Split, Central Waterfront and San Francisco, 2000

Transport Mode	Central Waterfront		San Francisco		Central Waterfront as % of San Francisco
	No of Commuters	%	No of Commuters	%	
Car	536	52%	202,707	47%	0%
<i>Drove Alone</i>	452	44%	168,639	39%	0%
<i>Carpooled</i>	84	8%	34,068	8%	0%
Transit	253	25%	140,571	32%	0%
Motorcycle	-	0%	11,367	3%	0%
Bike	25	2%	41,593	10%	0%
Walk	29	3%	8,142	2%	0%
Other	186	18%	28,952	7%	1%
Worked at Home	1,029	100%	433,332	100%	0%
Totals	13,857	100.0%	418,553	100.0%	3.3%

and streetscape improvements and describes streetscape requirements for new development. Major themes and ideas include:

- Distinctive, unified streetscape design: Street trees as defining the streetscape rhythm; integrated site furnishings; regular pedestrian-oriented lighting; minimizing cluttering elements.
- Space for public life: Safe, useable public seating for neighborhood gathering; generous curb extensions for seating and landscaping; reclaiming of excess street space for public use; space for outdoor café and restaurant seating and merchant displays.
- Enhanced pedestrian safety: Safe, convenient pedestrian crossings; curb radii and curb extensions that slow traffic, shorten crossing distance, and enhance visibility; pedestrian countdown signals and other pedestrian priority signals (head-start, pedestrian scramble).
- Improved street ecology: On-site stormwater management to reduce combined sewer overflows; resource-efficient elements and materials; streets as green corridors and habitat connectors.
- Universal design and accessibility: Generous, unobstructed sidewalks, curb ramps for all users, accessible pedestrian signals.

- Integrating pedestrians with transit: Transit rider amenities at key stops; safe, convenient pedestrian routes to transit; mutual features that benefit pedestrian safety and comfort and transit operations, such as bus bulb-outs and boarding islands.
- Creative use of parking lanes: Permanent curb extensions with seating and landscaping; landscape planters in the parking lane; flexible, temporary use of the parking lane for restaurant seating or other uses.
- Traffic calming to reduce speeding and enhance pedestrian safety: Raised crossings and speed tables; landscaped traffic circles; chicanes.
- Pedestrian-priority designs: Shared public ways; temporary or permanent street closures to vehicles; sidewalk and median pocket parks.
- Extensive greening: Healthy, well-maintained urban forest; expanded sidewalk plantings; efficient utility location to provide more potential planting locations.

The Better Streets Plan only describes a vision for ideal streets and seeks to balance the needs of all street users and street types. Detailed implementation strategies will be developed in the future.

4.3 Recreation and Open Space

The maintenance of existing, and provision of new, recreation and park facilities are also called for by the Central Waterfront Plan. As an industrial area, many parts of the Central Waterfront Plan Area are not within walking distance of an existing park or other open space that serves workers and residents. Specifically, the Plan identifies a need for 1.9 acres of new open space to serve both existing and new residents, workers and visitors.

The Central Waterfront Plan identified a number of potential park sites including the area behind the I.M. Scott School site, an expansion of Warm Water Cove, and the development of Crane Cove Park on Pier 70. The area around Irish Hill is also identified as a potential park site, as are waterfront improvements at the end of 22nd Street.

The City is currently working with the San Francisco Unified School District on the I.M. Scott School site and the Port of San Francisco on the development of Crane Cove Park as well as the renovation and expansion of Warm Water Cove. Located at 19th and Illinois Street, Crane Cove Park is being considered for over 1,200 feet of Bay edge access, and a small boat/aquatic center. Also envisioned is the renovation and future expansion of Warm Water Cove, a small landscaped picnic area at the end of 24th Street adjacent to the Bay.

Significant funding is needed however, to acquire, develop, and maintain new open space, as well as maintain existing spaces at a higher level. Impact fees from new development can partially fund these spaces, as can open space bonds issued by the Port and the Recreation and Park Department. At this time, additional funding sources to develop these open spaces have yet to be identified.

4.4 Community Facilities

Community facilities can include any type of service needed to meet the day-to-day needs of residents. These facilities include libraries, parks and open space, schools and child care. Community based organizations also provide many services to area residents including health, human services, and cultural centers. In the Central Waterfront, these include the Omega Boys Club, Esprit Park and Woods Yard Park.

The Central Waterfront currently contains some housing which is expected to increase in the future. There are few neighborhood services and amenities however, to meet the needs of residents or workers (Map 7). As new housing development is expected in the Central Waterfront, new residents will increase the need to add new community facilities and to maintain and expand existing ones.

Map 7
Community Facilities, Central Waterfront, 2010



4.5 Neighborhood Serving Establishments

Neighborhood serving businesses represent a diversity of activities beyond typical land use categories such as retail. Everything from grocery stores, auto shops and gas stations, to banks and schools which frequently host other activities, can be considered “neighborhood serving.” This section defines neighborhood serving as those activities of an everyday nature associated with a high “purchase” frequency (see Appendix D for a list of business categories used).

By this definition, the Central Waterfront is home to about 30 neighborhood serving businesses and establishments employing over 280 people. Over 10 of these businesses are estimated to have been established since 2006. These tend to be smaller businesses frequented by local residents and workers.

As shown in Table 4.5.1, neighborhood serving businesses in the Central Waterfront are mostly restaurants and a variety of other establishments. These businesses are located throughout the Central Waterfront but concentrated along 3rd Street (Map 8).

Table 4.5.1
Neighborhood Serving Establishments, Central Waterfront, 2010

Type	Establishments	Employment
Full-Service Restaurants	5	39
Limited-Service Restaurants	4	39
Other	21	206
Grand Total	30	284

Map 8
Neighborhood Serving Facilities, Central Waterfront, 2010



4.6 Jobs Housing Linkage Program (JHLP)

Prompted by the Downtown Plan in 1985, the City determined that large office development, by increasing employment, attracts new residents and therefore increases demand for housing. In response, the Office Affordable Housing Production Program (OAHPP) was established in 1985 to require large office developments to contribute to a fund to increase the amount of affordable housing. In 2001, the OAHPP was re-named the Jobs-Housing Linkage Program (JHLP) and revised to require all commercial projects with a net addition of 25,000 gross square feet or more to contribute to the fund.

Between fiscal year 2006 and 2010, nearly \$22 million was collected, all from projects in the Downtown C-3 zoned district. Due to the current economic recession the program has collected no money after fiscal year 2007 (Table 4.6.1). Since the program was established in 1985, a total of \$72.3 million has been collected to partially subsidize the construction of over 1,000 units of affordable housing.

Table 4.6.1
Jobs-Housing Linkage Fees Collected, 2006-2010

Fiscal Year	Revenue
2006-07	\$ 11,880,503
2007-08	\$ 10,213,342
2008-09	-
2009-10	-
2010-11	-
TOTALS	\$ 22,093,845

5. IMPLEMENTATION OF PROPOSED PROGRAMMING

5.1 Eastern Neighborhoods Citizens Advisory Committee

The Eastern Neighborhoods Citizens Advisory Committee (EN CAC) is the central community advisory body charged with providing input to City agencies and decision makers with regard to all activities related to implementation of the Eastern Neighborhoods Area Plans. It was established for the purposes of providing input on the prioritization of Public Benefits, updating the Public Benefits program, relaying information to community members in each of the four neighborhoods regarding the status of development proposals in the Eastern Neighborhoods, and providing input to plan area monitoring efforts as appropriate. The EN CAC is composed of 15 voting members – nine appointed by the Board of Supervisors, and six appointed by the Mayor. In addition, there are four non-voting members representing Western SoMa, two appointed by the Board of Supervisors, and two by the Mayor. These non-voting members with attain voting status upon the adoption and integration of the Western SoMa Impact Fees into the Eastern Neighborhoods Public Benefits Fund.

To date, the ENCAC has supported the allocation of \$2.42 million for the development of a new park at 17th and Folsom Street in the Mission District. As of the writing of this report, just over \$750,000 has been collected.

The EN CAC has held monthly public meetings since October, 2009. For more information on the EN CAC, go to <http://encac.sfplanning.org>.

Table 5.2.1
Eastern Neighborhoods Fees Collected, 2006-2010

Area	Revenue	Projects
SOMA	\$540,908	2
Central Waterfront	\$119,901	1
Mission	\$90,454	7
Showplace/Potrero	\$0	0
TOTAL	\$751,263	10

5.2 Fees Program and Collection

The Eastern Neighborhoods Public Benefit Fee was established to fund community improvements throughout the Eastern Neighborhoods, including the Central Waterfront Plan Area.

Impact fees will be used to fund capital improvements, including open space and recreational facilities, transit and transportation improvements, and community facilities such as child care and public library needs. The fee may also be used to fund housing needs, such as housing construction and preservation. Fee revenue are periodically updated and currently range from \$8 to \$24 per square foot (effective 5/11). Fee revenues will be allocated as follows:

- For residential development: open space and recreational facilities = 50%, transit streetscape and public realm improvements = 42%, community facilities = 8%.
- For commercial development: open space and recreational facilities = 7%, transit streetscape and public realm improvements = 90%, community facilities = 3%

In areas designated for housing including Mixed Use Residential zones and the Mission NCT, portions of the impact fee resulting from up-zoning will be directed towards affordable housing construction and preservation. In these areas, the increased fee revenue above the base \$8 collected for residential development may be used to further mitigate impacts on affordable housing, including acquisition and rehabilitation programs to support existing residents.

Analysis based on development projections for the overall Eastern Neighborhoods, estimates that the fee could generate from \$77-130 million over the life of the plan.

As shown in Table 5.2.1, over \$751,000 from 10 projects has been collected since the fee was established in January 2009. In the Central Waterfront, about \$120,000 was collected from one project.

5.3 Historic Preservation

The Central Waterfront historic survey has been completed and adopted by the Historic Preservation Commission. The Central Waterfront Plan boundary is from Mariposa Street south to Islais Creek and from the I-280 east to the Bay. The Planning Department and the Dogpatch Neighborhood Association surveyed the plan area in 2000 and 2001. All properties built before 1956 within the Central Waterfront Plan Area were surveyed. A significant residential enclave has since been listed in Article 10 of the Planning Code as the Dogpatch Historic District. The Port of San Francisco has independently opted to seek consultant services to focus on Pier 70 Port-owned properties for more intensive historical analysis.

The Department's 2001 survey was updated in 2007 and 2008 to include the completion of a historic district record for the industrial area outside of both Pier 70 and Dogpatch. Recommendations to establish new historic districts and designate individual structures of merit will follow.

5.4 First Source Hiring

The First Source Hiring Program was first adopted in 1998 and modified in 2006. The intent of First Source is to connect low-income San Francisco residents with entry-level jobs that are generated by the City's investment in contracts or public works; or by business activity that requires approval by the City's Planning Department or permits by the Department of Building Inspection.

Projects that qualify under First Source include:

- Any activity that requires discretionary action by the City Planning Commission related to a commercial activity over 25,000 square feet including conditional use authorization;
- Any building permit applications for a residential project over 10 units;
- City issued public construction contracts in excess of \$350,000;
- City contracts for goods and services in excess of \$50,000;
- Leases of City property;
- Grants and loans issued by City departments in excess of \$50,000.

The First Source Hiring program is managed by the Office of Economic and Workforce Development (OEWD). Between fiscal years 2005-06 and 2010-11, the OEWD reported that 2,492 residents were placed into entry-level jobs including 1,752 in public projects, and 740 in private projects.

6 APPENDICES

6.1 APPENDIX A.Eastern Neighborhoods Monitoring Requirements Ordinance

(5) *Development Activity.* The report shall detail all development activity in the Plan Area over the Monitoring Period, including additions and deletions of residential and commercial space, and shall include unit size and bedroom count of units constructed, retail space and employment generated, conversions and other development statistics. The monitoring program shall include the following categories of information:

(A) *Office Space.* Amount of office space constructed in preceding years and related employment.

(B) *Visitor and Hotel Space.* Amount of hotel rooms constructed in preceding years and related employment.

(C) *Retail Space.* Amount of retail space constructed in preceding years and related employment.

(D) *Business Formation and Relocation.* An estimate of the rate of the establishment of new businesses and business and employment relocation trends and patterns within the City and the Bay Area.

(E) *Housing.* An estimate of the number of housing units newly constructed, demolished, or converted to other uses.

(6) *Public Benefit.* The report shall detail the construction of any improvements or infrastructure as described in the Eastern Neighborhoods Public Benefits Program, a copy of which is on file with the Clerk of the Board of Supervisors in File No. 081155 and is incorporated herein by reference. The report shall include the following categories of information:

(A) *Inclusionary Housing Program.* A summary of the number and income mix of units constructed or assisted through this program, an analysis of units constructed within each alternative, including new alternatives established for the Eastern Neighborhoods UMU districts.

(B) *Jobs/Housing Linkage Program.* A summary of the operation of the Jobs/Housing Linkage Program (formerly the Office Affordable Housing Production Program) and the Housing Affordability Fund, identifying the number and income mix of units constructed or assisted with these monies.

(C) *Streetscape, Transportation, and Public Realm.* A detailed description of any transportation serving infrastructure completed in the preceding five years, including transit, pedestrian, bike, traffic and other modes of transportation.

(D) *Open Space and Recreational Facilities.* A summary of new parks, trails, public rights-of-way, recreational facilities or activity space completed to serve the purposes of recreation in the preceding five years, as well as any improvements to parks or recreational facilities.

(E) *Community facilities.* An assessment of the existing service capacity of community services and facilities, and of any new services or facilities joining the neighborhood in the past five years. This shall include a review of child care, library services and any other categories deemed relevant, such as health care centers, human services, and cultural centers.

(F) *Neighborhood Serving Businesses.* An assessment of neighborhood serving businesses in the area, including their establishment, displacement, and economic health.

(7) *Fees and Revenues.* The report shall monitor expenditure of all implemented fees, including the Eastern Neighborhoods Impact Fee and all Citywide fees, and tax revenue, as listed below. It shall report on studies and implementation strategies for additional fees and programming.

(A) *Impact Fee.* A summary of the collected funds from the Eastern Neighborhoods Impact Fee collected from development, and a detailed accounting of its expenditure over that same period.

(B) *Fiscal Revenues.* An estimate of the net increment of revenues by type (p)roperty tax, business taxes, hotel and sales taxes) from all uses.

(C) *Fee Adjustments.*

(i) The Planning Department shall review the amount of the Eastern Neighborhoods fee against any increases in construction costs, according to changes published in the Construction Cost Index published by Engineering News Record, or according to another similar cost index should there be improvements to be funded through the Eastern Neighborhoods Impact Fee as listed in the Eastern Neighborhoods Program.

(ii) The Planning Department shall review the level of the Eastern Neighborhoods housing requirements and fees to ensure they are not so high as to prevent needed housing or commercial development.

(8) *Agency Responsibilities.* All implementing agencies identified in the Eastern Neighborhoods Implementa-

tion Matrix shall be responsible for:

(A) Reporting to the Planning Department, for incorporation into the Monitoring report, on action undertaken in the previous reporting period to complete the implementation actions under their jurisdiction, as referenced in the Eastern Neighborhoods Implementation Matrix.

(B) Providing an analysis of the actions to be completed in the next reporting period, for incorporation into the Monitoring report, including a description of the integrated approach that will be used to complete those tasks.

(i) To the extent the Agencies identified in the Implementation Matrix are outside the jurisdiction of this Board, this Board hereby urges such Agencies to participate in this process.

(9) *Budget Implications.* In cooperation with the Annual Progress reports required by Administrative Code Chapter 36.4, and prior to the annual budget process, the Board shall receive a presentation by the Interagency Planning and Implementation Committee and its member agencies to describe how each agency's proposed annual budget advances the Plans' objectives, including specific projects called for by this section. The Board of Supervisors shall give particular consideration to proposed agency budgets that meet the implementation responsibilities as assigned by the City's General Plan, including the Eastern Neighborhoods Implementation Matrix. Budget proposals that do not include items to meet these implementation responsibilities shall respond to Board inquiries as to why inclusion was not possible.

6.2 APPENDIX B. LISTS AND TABLES

Table BT-1
Land Use Distribution, Central Waterfront and San Francisco, 2010

Land Use	Central Waterfront		San Francisco		Central Waterfront as % of San Francisco
	Area Sq Ft (000s)	% Distribution	Area Sq Ft (000s)	% Distribution	
Residential	395,670	2%	420,058,589	42%	0%
Mixed Residential	365,430	0%	28,985,223	0%	1%
Office	623,146	3%	25,576,575	3%	2%
Retail/ Entertainment	358,168	2%	21,579,948	2%	2%
PDR/Light Industrial	9,750,248	54%	41,935,022	4%	23%
Cultural, Educational, Institutions	39,361	0%	59,215,798	6%	0%
Hotel/Lodging		0%	3,484,054	0%	0%
Mixed Uses	571,277	3%	65,079,287	6%	1%
Public/Open Space	3,428,784	19%	288,199,531	29%	1%
Vacant	2,387,962	13%	53,020,516	5%	5%
Right of Way	149,848	1%	942,007	0%	16%
TOTALS	18,069,894	100%	1,008,076,550	100%	2%

List BL-1
Commercial Development Projects Completed, Central Waterfront, 2006-2010

Address	Mixed Use No of Units	Total Gross Sq Ft	CIE	MED	MIPS	PDR	RET	VISIT
900 Minnesota St	160	15,000	-	-	-	-	15,000	-
680 Illinois St	35	7,926	-	-	-	-	7,926	-
Totals	195	22,926	-	-	-	-	22,926	-

List BL-2
Commercial Development Pipeline, Central Waterfront, Q4 2010

	Status	Address	Mixed Use No of Units	Total GSF (Commercial)	Office	CIE	Medical	PDR	Retail	Visitor
Entitled Projects	Under Construction	1301 Indiana St	81	5,000	-	-	-	-	5,000	-
		2235 03RD ST	196	5,339	-	-	-	-	5,339	-
	Sub-Totals - Entitled		277	10,339	-	-	-	-	10,339	-
Projects Under Review	Building Permit Filed	616 20TH ST	16	2,000					2,000	-
		2298 03RD ST	40	14,000	-	-	-	-	14,000	-
	Sub-Totals Projects Under Review		56	16,000	-	-	-	-	16,000	-
	TOTALS		333	26,339	-	-	-	-	26,339	-

List BL-3**Major Residential Development Completed, Central Waterfront, 2006-2010**

	Street Address / Project Name	Total Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales Price or Rental Price
2009	Homes on Esprit Park 900 Minnesota St	75	IL	60 - 1 BR 14 - 2 BR 1 - 3 BR	Ownership	n/a
	550 - 18th St 680 Illinois St 2075 Third St	35	off-site	27 - 2 BR 8 - 3 BR	Ownership	n/a
2010	Park Esprit 800 Minnesota St	67	IL	34 - 1 BR 33 - 2 BR	Rental / Ownership	\$2,475 rentals
	638 - 19th St	21	2 BMR	11 - 2 BR 10 - 3 BR	Ownership	\$699,000

List BL-4**Residential Development Pipeline, Central Waterfront, Q4 2010**

Development Status		Address	Units	Mixed Use
ENTITLED	Construction	1301 Indiana St	81	
		1011 TENNESSEE ST	3	
		2235 03RD ST	196	X
	Building Permit Approved / Issued / Re-Instated	1067 TENNESSEE ST	3	
		1179 TENNESSEE ST	8	
	Subtotals Entitled		291	
UNDER REVIEW	Building Permit Filed	2298 03RD ST	40	X
		616 20TH ST	16	
	Under Planning Review	740 ILLINOIS ST and 2121 THIRD ST	70	
		2420 03RD ST	1	X
	Subtotals Under Review		127	
TOTALS		418	x	

List BL-5**List of Affordable Housing, Household Income Target and Funding Source, Market & Octavia, 2005-2009**

Year Built	Address	No of Affordable Units	Household Income Target	Tenure Type	Funding Source or Program
2010	638 - 19th St	2	Moderate	Ownership	Inclusionary

6.3 APPENDIX C.

Eastern Neighborhoods Priority Capital Projects

EN Priority Capital Projects

List of Projects to Be Considered (in order of priority)

Townsend Street - Pedestrian Improvements

Townsend Street provides a direct route to the Caltrain Station (4th & King Streets). The project includes the introduction of a parking lane buffer to accommodate pedestrian traffic where no sidewalks exist along Townsend Street from 4th to 8th Streets, using funding secured by MTA to install “wheel blocks” and paint stripes to establish a clear, safe walkway to the Caltrain station. Future improvements, not included as part of this project, may include long-term improvements implemented as a part of the Transbay Joint Powers Authority (TJP A) Transit Center project phase II downtown rail extension.

- Total Cost: TBD, depending on scope of improvements.
- Funding available: \$10,000 (SFMT A)
- Need: TBD.
- No matching funds required; SFMT A/DPW to commence construction as soon as possible.

Victoria Manalo Draves Park - Pedestrian Improvements

Pedestrian improvements include a mid-block crosswalk, bulb outs and traffic/pedestrian signal to connect pedestrians between the Soma Eugene Friend Recreation Center, Bessie Carmichael School and the park. These improvements should be coordinated with DPW’s Folsom St resurfacing project.

- Total Cost: \$611,000. Note: cost is an estimate only, pending further capital cost estimates.

- Funding available: \$0

- Need: \$611,000

Folsom Street - Streetscape Improvements

The Eastern Neighborhoods Plans call for redesigning Folsom Street as a “civic boulevard” to serve as a major neighborhood commercial street in the South of Market. The improvements should be coordinated with DPW’s Folsom St resurfacing project. Streetscape improvements may include all or some of the following: street tree plantings, tree grates, curb bulb-outs, special paving, pedestrian lighting, widened sidewalks, street restriping and transit shelters.

- Total Cost: \$11,000,000. Note: cost is an estimate only, pending further capital cost estimates.

- Funding available: \$0

- Need: \$11,000,000

16th Street - Streetscape Improvements

In recognition of 16th Street’s role as a major transit corridor in the Eastern Neighborhoods an accompanying streets cape plan will be developed. Streetscape improvements should be directed towards improving pedestrian and transit connections, and may include all or some of the following: cross-walk improvements, street tree plantings, tree grates, curb bulb-outs, pedestrian lighting, and transit shelters.

- Total Cost: \$8,500,000. Note: cost is an estimate only, pending further capital cost estimates.

- Funding available: \$0

- Need: \$8,500,000

List of MTA Projects

16th Street - Transit Improvements

The project involves an extension of the Muni Route 22-Filmore along 16th Street east of Kansas Street to a terminal on Third Street in Mission Bay. The proposed extension will provide a transit link between the 16th Street BART station, Mission District, Showplace Square, Mission Bay and the Third Street Light Rail. Capital costs include the installation of new overhead trolley wires along 16th Street from Kansas Street to Third Street.

- Total Cost: \$12,000,000. Note: cost is an estimate only, pending further capital cost estimates.
- Funding available: \$4,500,000 (Prop K)
- Need: \$7,500,000

List of Department of Recreation and Parks Projects

New 17th & Folsom Park

The project seeks the planning, design and construction of a new park in the Mission. Specifically, this project entails the creation of a new park atop approximately 60% of the existing PUC-owned surface parking lot on 1st & Folsom Streets.

- Total Cost: Cost is pending further capital cost estimates.
- Funding available: \$0
- Need: TBD

List of Planning Projects

Showplace Square Open Space Plan (including implementation of one open space project)
The Showplace Square neighborhood has been determined to be deficient in open space. An open space and streetscape plan will be developed to identify opportunities where excess street right-of-way can be used to create new public plazas and open spaces. This project will include the design and construction of one new public open space.

- Total Cost: \$2,600,000. Note: cost is an estimate only, pending further capital cost estimates.
- Funding available: \$0
- Need: \$2,600,000

List of MOH Projects (in order of priority)

New Affordable Housing Units

The acquisition of appropriate land for the construction of 150 below market rate affordable units(BMRs), at a minimum, within the EN Plan Areas within five years following the adoption of the EN Plan. MOH shall further dedicate approximately seventy-five percent (75%) of all new EN Development Impact Fees collected within the Mission NCT and South of Market Youth and Family Zone ("YFZ").

Eastern Neighborhoods Acquisition and Rehabilitation Program

Using \$10M of affordable housing fees generated from the Eastern Neighborhoods Impact Fees, MOH shall acquire and rehabilitate existing housing projects in the Mission and South of Market Sub-Areas of the EN Plan.

6.4 APPENDIX D.

List of Neighborhoods Serving Business Codes

NAICS	Label
311811	Retail Bakeries
445110	Supermarkets and Other Grocery (except Convenience) Stores
445120	Convenience Stores
445210	Meat Markets
445220	Fish and Seafood Markets
445230	Fruit and Vegetable Markets
445291	Baked Goods Stores
445299	All Other Specialty Food Stores
445310	Beer, Wine, and Liquor Stores
446110	Pharmacies and Drug Stores
446120	Cosmetics, Beauty Supplies, and Perfume Stores
446191	Food (Health) Supplement Stores
447110	Gasoline Stations with Convenience Stores
447190	Other Gasoline Stations
448110	Men's Clothing Stores
448120	Women's Clothing Stores
448130	Children's and Infants' Clothing Stores
448140	Family Clothing Stores
448150	Clothing Accessories Stores
448190	Other Clothing Stores
448210	Shoe Stores
451110	Sporting Goods Stores
451120	Hobby, Toy, and Game Stores
451130	Sewing, Needlework, and Piece Goods Stores
451211	Book Stores
451212	News Dealers and Newsstands
451220	Prerecorded Tape, Compact Disc, and Record Stores
452112	Discount Department Stores
452990	All Other General Merchandise Stores
453110	Florists
453210	Office Supplies and Stationery Stores
453310	Used Merchandise Stores
453910	Pet and Pet Supplies Stores

453910	Pet and Pet Supplies Stores
519120	Libraries and Archives
522110	Commercial Banking
522120	Savings Institutions
532230	Video Tape and Disc Rental
611110	Elementary and Secondary Schools
611210	Junior Colleges
624410	Child Day Care Services
713940	Fitness and Recreational Sports Centers
722110	Full-Service Restaurants
722211	Limited-Service Restaurants
722212	Cafeterias, Grill Buffets, and Buffets
722213	Snack and Nonalcoholic Beverage Bars
722410	Drinking Places (Alcoholic Beverages)
811111	General Automotive Repair
811112	Automotive Exhaust System Repair
811113	Automotive Transmission Repair
811118	Other Automotive Mechanical and Electrical Repair and Maintenance
811192	Car Washes
811430	Footwear and Leather Goods Repair
811490	Other Personal and Household Goods Repair and Maintenance
812111	Barber Shops
812112	Beauty Salons
812113	Nail Salons
812310	Coin-Operated Laundries and Drycleaners
812320	Drycleaning and Laundry Services (except Coin-Operated)
812910	Pet Care (except Veterinary) Services
812922	One-Hour Photofinishing
813110	Religious Organizations
813410	Civic and Social Organizations

Acknowledgements

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